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RESEARCH

Digital Interactive Agencies – Market Report 2018: Digital Marketing in the Cognitive Era

Digital Services
Market Report – December 2017: Complimentary Abstract / Table of Contents

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- Benchmarking | Pricing, delivery model, skill portfolio
- Peer analysis | Scope, sourcing models, locations
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Background of the research

Background of the research

- The digital interactive agency space is undergoing a dynamic shift with a diverse set of players expanding their capabilities in digital marketing. The marketing industry saw nearly 400 M&A deals estimated at US$14 billion, with consulting firms alone spending over US$470 million on marketing acquisitions in 2016, a jump of over 200% over 2015
- The role of digital marketing is evolving continuously; it is no longer an afterthought for enterprises but an integral part of the overall business strategy. Enterprises are looking to drive business growth and increase customer satisfaction through digital marketing initiatives
- As the number of channels to engage with customers keep increasing every year, enterprises are adopting an omnichannel marketing strategy, investing to maximize returns, restructuring marketing leadership, and partnering with digital interactive agencies for support. This in turn has triggered a shift in the interactive agencies space, where leading providers are acquiring niche companies and talent to provide a complete digital marketing solution to enterprises
- In this research, we present key digital marketing trends and detailed profiles of leading digital interactive agencies. Each digital interactive agency profile provides a comprehensive picture of its service focus, key Intellectual Property (IP) / solutions, domain investments, awards, and recent developments

Scope of this report

- **Services:** Digital interactive services
- **Geography:** Global
- **Scope:** Ten leading digital interactive agencies

This report includes the profiles of the following 10 digital interactive agencies:

Accenture, Cognizant, Deloitte Digital, DigitasLBi, Havas, IBM iX, Mirum, PwC Digital, SapientRazorfish, and TCS

Source: AdAge; Everest Group (2017)

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Scope for digital interactive agencies research

NOT EXHAUSTIVE

Key focus areas for this assessment Optional areas for this assessment

Digital marketing services

Channels / interaction layer

Strategy
Digital Strategy, Brand and Media Strategy, Omnichannel Marketing Strategy, Digital Transformation Consulting

Core Marketing
Social media marketing, mobile marketing, loyalty marketing, email marketing, inbound marketing, performance marketing, SEO/SEM

Creative and Content
UI/UX design and management, web/mobile design, e-commerce design, creative design (email, video, print), campaign development, content production and management

Technology
Web development, mobile development, e-commerce development, marketing automation

Operations and Analytics
Multi-channel analytics (web, social, mobile), data visualization, performance management, marketing operations, optimization methodologies, database design and management

Platforms and tools

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Overview and abbreviated summary of key messages

This report examines the key digital marketing trends and detailed profiles of leading digital interactive agencies. It provides a comprehensive analysis of key imperatives for enterprise and service providers. It also assesses top digital interactive agencies on their service focus, key IP / solutions, domain investments, awards, and recent developments.

Some of the findings in this report, among others, are:

Increasing enterprise demand leading to shift in services landscape

- Enterprises are increasingly adopting digital marketing with high demand for end-to-end digital marketing services
- High demand for digital marketing has triggered a shift, with different industry players expanding their digital marketing services portfolio aggressively

Cognitive is the future and content is the differentiator

- Enterprises are focusing on digital marketing as an integral part of their business strategy; cognitive marketing will be the next breakthrough with rapid adoption of AI
- Need for personalization, mobile-readiness, and video will make content the market differentiator for enterprises of all sizes

The CMO is evolving with the rapidly changing landscape

- The CMO's role is under tremendous pressure to drive business growth and collaborate with technology leaders to deliver results
- Enterprises are reinventing the CMO role and even creating new growth-focused roles
- New roles, such as Chief Growth Officer, are focused not only on marketing but also strategy, insights, and customer experience

Source: Everest Group 2017

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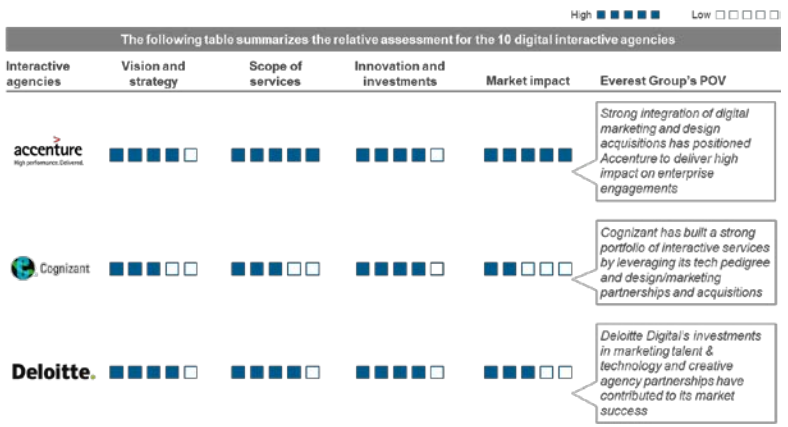
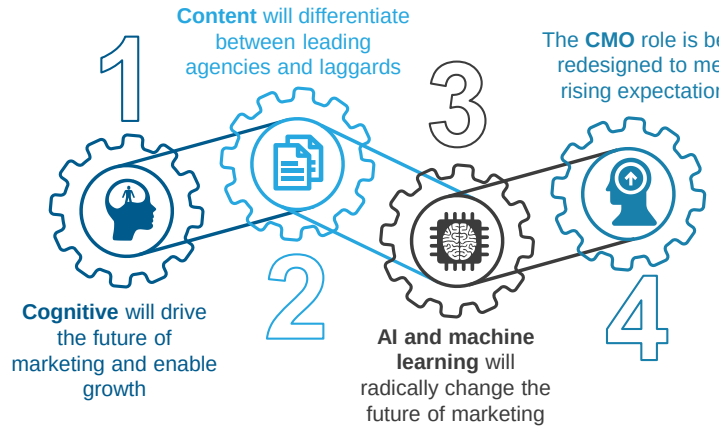
This study offers a deep dive of digital interactive services market; below are four charts to illustrate the depth of the report

Everest Group assessment of digital interactive agencies

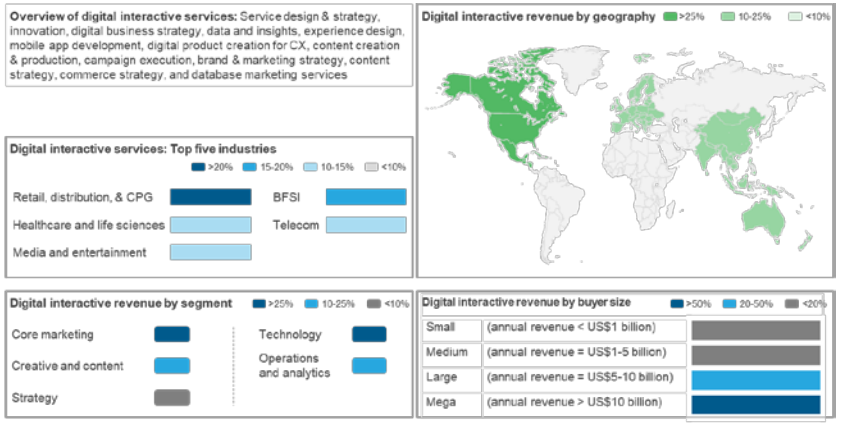


Key digital marketing trends



Key imperatives for enterprises and service providers

Digital interactive agency profile



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Research calendar – Digital services

Published | Planned | Current release

Flagship Digital Services Reports	Release date
IoT Services PEAK Matrix™ Assessment and Market Trends – IoT: Bigger than the Hype	December 2016
Beware of the Digital Dip	March 2017
Digital Services – PEAK Matrix™ Assessment and Market Trends 2017: "Redefining Customer Experience with Digital"	October 2017
Enterprise Digital Adoption | Pinnacle Model™ Assessment 2017	November 2017
IoT Services PEAK Matrix™ Assessment and Market Trends 2017: Have You Taken the Plunge in IoT Yet?	December 2017
Digital Interactive Agencies – Market Report 2018: Digital Marketing in the Cognitive Era	**December 2017**

Thematic Digital Services Reports	
Customer (Dis)Satisfaction: Why Are Enterprises Unhappy with Their Service Providers?	January 2017
Internet of Things (IoT) in Medical Devices	March 2017
Top 20 IoT Trailblazers: Startups Crossing the Chasm	May 2017
Betting Big: Amazon Leveraging Digital to Transform the Grocery Industry	June 2017
Quality Orchestration: QA in the Digital Era	July 2017
Design Thinking: Innovation Catalyst for Digital Transformation	July 2017
Enterprise Bots Adoption	July 2017
DevOps Best Practices	Q1 2018

Note: For a list of all digital services reports published by us, please refer to our website page

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Additional Digital services research references

The following documents are recommended for additional insight on the topic covered in this report. The recommended documents either provide additional details or complementary content that may be of interest:

1. **Design Thinking: Innovation Catalyst for Digital Transformation** (EGR-2017-4-R-2242); 2017. In this research, we delve deeper into design thinking and its implications on various industries. We also deep dive into how service providers can inculcate a design-driven culture across the organization so that it is reflected in their service delivery. We further look at recent investments and acquisitions of services providers and consulting firms to grow their design-driven digital capabilities. There is also a dedicated enterprise section that details enterprise design maturity model and how new roles (such as Chief Design Officer(CDO)) are enabling organizations to be more design-focused

2. **Digital Services – PEAK Matrix assessment and Market Trends 2017: "Redefining Customer Experience with Digital"** (EGR-2017-4-R-2351); 2017. Digital adoption has moved from being an IT agenda to an organization-wide agenda, and enterprises are increasingly investing in digital technologies for achieving organizational goals such as driving customer loyalty, improving brand image, combating competition, and staying relevant in the market. Service providers too are realigning their portfolio, acquiring design capabilities, and revisiting their talent strategy to keep pace with the enterprise demand for improved customer experience. This research presents an assessment and detailed profiles of 22 IT service providers featured on Everest Group's PEAK Matrix for digital services for 2017

For more information on this and other research published by Everest Group, please contact us:

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